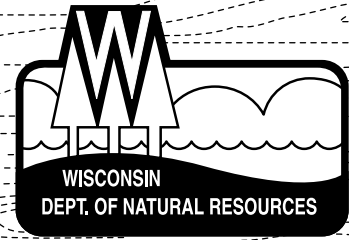


WISCONSIN WOOD

MARKETING BULLETIN



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WOOD MARKETING BULLETIN

The Wisconsin DNR publishes the "Wisconsin Wood" marketing bulletin every three months. It serves the timber producing and wood using industries of Wisconsin by listing items: For sale - forest products, equipment and services, wanted - forest products, equipment and services; employment opportunities. There is no charge for the Bulletin or inserting items in it. Only items deemed appropriate to the timber producing and wood processing industries will be listed. Also the Bulletin will feature forest products utilization and marketing news, safety notes, coming events, new literature, tips to the industry, and listing or employment wanted or positions that are available.

If you know of someone who would like to be on the Bulletin mailing list, please ask them to send their name, address and zip code to the return address on the back page. Also, if you have items to list, send in the form or write a letter to the return address on the back page. Repeat listing of items requires a written request each time the item is to be repeated.

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PROPER METHOD OF BORE CUTTING REVISITED

Experience has shown us that the bore cut or plunge cut is best suited for staying in control of the tree instead of the tree controlling the sawyer. It also makes directional felling much more predictable and generally produces better quality butt logs because of the reduction of stump pull, fracturing, and side scarring.

To use this technique however, it is strongly suggested that professional training be a prerequisite. Without proper training, understanding the physics of this technique might be vague and/or totally misinterpreted.

One of the first items that must be mastered is to know the reactive forces to the bar and chain. Understanding that bore cutting done incorrectly can provide severe kickback potential, it is imperative that knowing how to prevent kickback during the bore cut is critical. Knowing the reactive forces of the bar and chain is the first step in that process. Remember that the tip of the bar is always used to start the bore cut, and that using the bottom half of the tip of the bar (attack corner) will help prevent kickback, while using the top half of the tip of the bar (the kickback corner) will almost always result in kickback, or the potential for kickback.

That being said, properly performed, the safety and quality aspects of bore cutting cannot be overstated. Safe because of the ability to control the tree, both in its release and its direction of fall, and quality because of the ability to reduced stump pull, side scarring, and barber chairing.

Basically, the bore cut technique starts with using the open face notch, which was discussed in earlier articles. Then, starting with the bottom of the tip of the bar, (the attack corner) penetrate the trunk of the tree at the same level as the notch cut apex (where the two notch cuts met) and far enough behind the notch to ensure enough hinge wood. While performing the bore cut, be sure the saw is running at maximum rpms and is sharpened properly – this will allow the saw to bore smoothly into the trunk of the tree. Always be sure the travel of the bar during the bore cut is AWAY from the hinge so the hinge will not be cut off or cut too thin. The size of the hinge is determined by a simple formula. The thickness of the hinge should be approximately 10% of the trees DBH, while the length of the hinge should be a minimum of 80% of the trees DBH. The thickness of the hinge should be approximately 10% to something less depending on the lean of the tree and the requirement to control its direction. As the sawyer gains experience in this technique, he/she will make those adjustments, but

the beginner should always use this formula.

As the bar exits the opposite side of the trunk of the tree, the sawyer can come forward toward the north to set the proper thickness of the hinge. Once that process is complete, the sawyer can cut back towards the back of the tree, and depending on the lean of the tree, and by which technique the sawyer feels comfortable with, the tree can then be released by pulling the saw out of the cut after establishing holding wood or trigger wood, or by continuing the bore cut completely through the back of the tree. If trigger wood is established it should be approximately two times the thickness of the hinge wood, to be sure the tree is secure prior to its release. If continuing the bore cut is the technique used, the sawyer should stop momentarily to look around to be sure no one is in the danger zone prior to cutting the trigger wood from the inside out.

To prevent side scarring during the felling technique, cutting the sides of the hinge deep enough to sever the last 5 years of growth, (generally no more than one inch on either side of the hinge,) will allow the hinge to control direction and release without side scarring.

Remember, using the boring technique is a specialized felling technique which normally requires professional training. Attempting this technique without proper training can create severe kickback of the saw and possible injury.

By Lee Schauman, Source: *Great Lakes Timber Professionals Association*, May 2011

PSC APPROVES BIOMASS PLANT: WE ENERGIES STILL UNDECIDED

We Energies won final approval to build a \$255 million biomass power plant in northcentral Wisconsin on May 12, 2011.

The utility had wanted a decision that week to help it keep on target to complete construction by late 2013.

The final decision was issued May 12th. It came after the utility amended its financing plan with Domtar agreeing to allocate more to the project.

But the utility hasn't decided whether it will proceed with building the plant at this point. We Energies and Domtar Corporation, its partner in the project are reviewing conditions that regulators attached to the deal – conditions that aim to bring down the overall cost of the project for utility customers, said utility spokesman Brian Manthey and Domtar spokesman Craig Timm.

The biomass plant at the Domtar paper mill in Rothchild, Wisconsin is being proposed at a time when the utility has enough power to meet the needs of its customers but is required because of the state's renewable portfolio standard.

That standard, adopted by the state Legislature in 2006, requires that 8.25% of the We Energies' power come from renewable sources by 2015.

If the project does not move forward, We Energies executives told investors they would want to have discussions with the Governor Walker administration about alternatives, including a possible way of delaying the company's compliance with the law.

There have been discussions of possible legislation that would help the utility delay the time frame for complying with the law, or it could take advantage of "off-ramps" built into the 2006 law that would allow it more time to comply.

Commission Chairman Phil Montgomery, who was a co-author of the renewable mandate when he served as the Republican chairman of the Assembly energy and utilities committee, noted during the meeting that the off-ramps are available and written into the current law.

But the two Democrats on the commission said they expected We Energies to proceed with the project – or find other ways to comply with the 2015 law.

"The vast majority of our utilities have already complied with it," said commissioner Lauren Azar, saying "it would be unfair for the other utilities" if they went ahead and made investments to comply with the state's renewable target in a timely manner and We Energies did not.

The commission decided to reduce the cost of the project for We Energies customers, which was a priority of the consumer advocacy group Citizens' Utility Board.

A group opposed to biomass power plants around the country criticized the PSC decision. The group challenges how green the projects are because – unlike wind farms and solar projects – they are combustion plants that release emissions of pollutants and greenhouse gases into the air.

"The PSC is forcing ratepayers and taxpayers to subsidize an incinerator, and calling it clean and green renewable energy," said Meg Sheehan of the Biomass Accountability Project.

Taxpayers would be helping subsidize the project in the form of renewable energy tax credits, she said.

We Energies had the support of two environmental groups in Wisconsin, Clean Wisconsin and Sierra Club. The utility agreed to propose the power plant as part of a settlement of a lawsuit by the environmental groups that challenged permits for the new Oak Creek coal plant that opened this year.

By Thomas Conent, Milwaukee Journal Sentinel, Source: *Great Lakes Timber Professionals Association, June 2011*

STUDY REVEALS COMPONENT MARKET TRENDS

The cabinet industry continues to be the largest end-use market for wood component products, primarily due to the steady strength of the remodeling market for kitchen, bath, closet and storage-related cabinetry. This information, along with other trends, is included in the "2011 Dimension & Components Market Study" by the Wood Component Manufacturers Association.

According to the study, the cabinet industry currently accounts for 33.1% of WCMA members' total business, compared to 31.2% last year. Although the kitchen and the bath cabinet industry retained a high percentage of WCMA members' products, the overall sales volumes in this industry decreased by 4.1% in 2010, according to the Kitchen Cabinet Manufacturers Association's Trend of Business Survey.

The building products industry – trim, mouldings, millwork, staircase parts, etc. – remained the second largest end-use market for WCMA members' products and represented 32.2% of WCMA participating members' shipments compared to 28% last year. This industry is expected to rebound as a major market for dimension and component manufacturers if the housing and remodeling markets show stronger recovery this year and into 2012.

The furniture industry stayed in third place, remaining fairly flat and accounting for 20.9% of dimension and component sales, compared to the 21.1% reported last year. This stability is generally attributed to more customization available from domestic manufacturers and to the fact that some furniture manufacturers have started outsourcing production back to the United States and Canada.

Decorative and specialty products remained in fourth place, with 8.1% of sales compared to 10.2% the previous year. This category includes musical instruments, caskets, toys, sporting goods, wall plaques, picture frames, cutting boards, novelty items, etc. Industrial wood products represented 4.5% of the total market for component products, down from 6.4% last year.

In looking at the type of components, cut-to-size blanks remained the number one category this year, accounting for 15.0% of all shipments, compared to 11.5% the previous year. Mouldings moved into second position, accounting for 13.9% of products shipped in 2010, compared to 8.2% in 2009. Stair parts moved up to third at 9.9%, up from 8.5%, followed by edge-glued panels at 9.4%; cabinet doors (5.2%); drawer boxes (3.5%); tool handles (4%); board programs (3.9%); cabinet parts (3.5%); and turnings (3.5%).

In looking at species preference, red oak remains popular, accounting for 20.5% of all wood used by participating WCMA companies. Hard maple dropped to 16.6%, followed by cherry at 11%, soft maple (9.7%), poplar (8.1%), beech (4.8%), white oak (4.8%), ash (4.1%), birch (3.6%), and composite panel (2.8%).

On the business side, 63% percent of participating WCMA companies indicated they are exporting dimension and component products to overseas markets, compared to 47% in the 2010 survey. Edge-glued panels was the largest dimension export product category, followed by cut-to-size blanks, furniture parts, stair parts, flooring, turnings, cabinet doors, mouldings and dowels. Canada was the number one export market among U.S. WCMA exporting members in 2010, with 26.8% of sales. The United Kingdom was second with 18.4% of export sales, followed by the United States (from Canada), Germany, China, Ireland, Japan and Mexico.

Overall, the study found that general outlook for the dimension and component manufacturing industry is for more of a

recovery later this year, going forward to 2012. WCMA members project their dimension and component sales to increase by an average of 10% in 2011 and estimate their net income to be 9% higher. Total employment is expected to rise by 5%, material costs by 5%, plant and equipment expenditures by 6%, and labor costs are expected to rise 5% in 2011. Source: *Wood & Wood Products*, July 2011.

WOODY BIOMASS FACTS: A LOOK AT THE MYTHS REGARDING A SUSTAINABLE ENERGY SOURCE **Fact vs Fiction**

Due to the growing interest in climate change, the environment, and energy security, woody biomass is receiving more and more attention as a renewable energy source. Though it still accounts for only a small portion of energy use world-wide, woody biomass is one of the top candidates for oil equivalents and a fast growing source of renewable energy. As a result, using biomass as an energy source has come under extensive scrutiny. Woody biomass has become the topic of intense debates and controversy as questions have been raised regarding its sustainability, cost-effectiveness, and greenhouse gas impact.

As the demand for biomass has grown, so has the number of criticism and misconceptions about it. One of the often heard complaints is that the burning of biomass as fuel released CO₂ and other greenhouse gases (GHG), contributing to global warming, making it no better than fossil fuels. In reality, woody biomass is a carbon neutral energy source. For this to be understood, it is necessary to look at the entire cycle, not just the combustion of the fuel. Trees are part of an atmospheric cycle. As they grow, they absorb carbon from the atmosphere temporarily storing it. When a tree dies, the same amount of carbon that it absorbed during its lifetime is released back into the atmosphere as it decomposes, adding no new carbon to the atmosphere. When woody biomass is burned to produce energy, it releases that same amount of carbon that would have naturally been released if the tree had been left to decompose on the forest floor.

Though woody biomass is a carbon neutral energy source, research has found that it also has several other environmental benefits as well. A study from the Pacific Research Institute found that biomass energy production contributes to healthy

forests and reduces the potency of the CO₂ that would otherwise be naturally released.

“The total amount of carbon that is sequestered in terrestrial biomass affects the amount of carbon in the atmosphere,” said Dr. Gregory Morris, director of Green Power Institute. “Energy production from forest fuels contributes to forest health and fire resiliency, thereby increasing the amount of carbon that is stored on a sustainable basis in the earth’s forests.”

Also, biomass energy production can change the timing and relative mix of carbon forms associated with the disposal of the biomass resources emitted into the atmosphere.

“As a greenhouse-gas, reduced carbon (CH₄) is 25 times more potent than oxidized carbon (CO₂) on an instantaneous, per-carbon basis,” said Dr. Morris. “Therefore the form in which carbon is transferred from the biomass stock to the atmospheric stock is critically important from the standpoint of greenhouse forcing impact.”

It is important to realize that much of the biomass that is converted to energy would otherwise be landfilled or left in the forest and eventually decompose or burn in a wildfire. Both ultimately lead to GHG emissions with higher levels of potency that if it had been burned in a controlled boiler.

“Compared to combustion in a controlled boiler, open burning entails poor combustion conditions and gives rise to significant emissions of carbon in a reduced form,” said Dr. Morris. “This elevates the greenhouse-gas potency of the emissions. Biomass burial in a landfill or agricultural field leads to even greater emissions of reduced carbon than open burning. Although the emissions from landfills are delayed, the greenhouse-gas potency of the emissions over the long term is much greater.

Beyond its positive affects on GHG emissions, the use of biomass also contributes to forest health in another way. There has been concern that increased biomass energy production would lead to deforestation. However, forests need to be properly managed to remain healthy. This includes thinning to prevent over-crowding and the removal of underbrush and fallen trees. Overgrowth forests can become unhealthy and have a higher susceptibility to disease, pest and wildfires. Biomass energy production can encourage sustainably managed and maintained forests and help offset the costs to do so by

paying for removal of overgrowth and residuals.

Despite the benefits provided for forests by biomass harvesting, some have taken to using the slippery slope argument that biomass power producers might run out of residuals, start using higher grade timber and be the cause of increased deforestation. However, this ignores the fact that part of what makes biomass energy affordable is that it utilizes cheap residuals. Buying expensive timber would not be profitable for anyone, let alone affordable. Bob Cleaves, president and CEO of the Biomass Power Association (BPA) said the biomass power industry cannot generate enough revenue to pay for its fuel, much less pay for higher value fiber like chip and pulpwood.

“We can’t afford biomass, let alone merchantable timber,” he said.

If biomass plants run out sources of forest residuals and byproducts, they shut down. Already 20% of the California biomass fleet has become non-operational due to a lack of residuals, Bob said.

For this reason, it is important that the nearby resources be considered carefully when the location for a biomass plant is being chosen. On a national basis, there is an abundant supply of wood residues, byproducts and slash available. A report on wood energy sources and uses from the U.S. Forest Service’s Forest Products Laboratory (FPL) said that there is enough wood readily available in the U.S. to provide up to 10% of the nation’s energy use from wood.

“We could increase use significantly, without depleting our timber resource, by using material not now used, such as logging residues, manufacturing residues, land-clearing residues, urban wood residues, and wood from insect, disease and fire-killed trees,” said the report. “Nationwide, volume of annual wood growth exceeds the volume that is cut.”

At present, biomass power provides more than half of the renewable “green” electricity in the U.S. – around 8,500 megawatts per year which provides enough electricity to light about 8.5 million homes – and roughly 4% of the country’s total energy use. The demand for renewable energy sources is only going to increase from this point. More than half of the states have already passed legislation that requires a portion of electricity be produced from renewable sources by 2020. A federal standard is also being considered. If passed, it will

create an even higher demand than there is now for renewable energy sources.

In spite of the research that shows woody biomass to be a sustainable and renewable alternative to fossil fuels and the growing need for just such a resource, there are still a number of obstacles in a way of it being recognized as such and utilized to its full potential. These include a lack of infrastructure for marketing wood fuel products, emphasis on non-wood fuels in research and subsidy programs, and failure to give due credit to environmental, natural security, and economic benefits of using wood fuels. If these obstacles are overcome, woody biomass could become key to energy security and an answer to climate change concerns.

By DeAnna Stephens Baker

Source: *Pallet Enterprise*, July 2011

ASIAN DEMAND KEEPS TIMBER PRICES AFLOAT

Fortunately, the American hardwood industry does not exist on an island, isolated from the world. In these years following the housing bust of 2008, the industry can thank the global economy – specifically, demand from Asia – for the current market buoyancy. Despite the American slowdown, global wood consumption is up 20 percent in the first quarter of 2011 when compared to last year's same quarter. This is very good news for an industry that, as some reports indicate, saw wood consumption at its lowest in about 50 years in 2010.

Demand for hardwoods, which in most other markets continues to nearly flat-line, is on the rise in Asia, especially in China. The difference in China today is that the Chinese themselves are becoming consumers, not just importers.

"The economic outlook for the use of hardwood lumber in the Asia market is strong," said Tony Cimorelli, director of marketing for Hamburg, New York – based Baillie Lumber. "What is promising is that the populations within countries like China are also starting to be consumers of (hardwood) products. The Asian market is no longer just a hardwood lumber destination for manufacturing to be exported to other countries as finished product. As the economic base in China continues to grow, Chinese nationals are looking for items such as hardwood flooring, cabinetry and windows."

RISI, an information provider for the global forest products industry, recently reported in a study that China's timber supply deficit will jump from 107 million

cubic meters in 2009 to 18.3 million cubic meters in 2015. Robert Flynn, author of the study, said "China's timber supply deficit, already as large as Canada's total timber harvest, is forecast to expand by another 55 percent by 2015.

What our customers are asking us is: What form will timber imports be in? And where will they come from? Traditionally, China has mostly imported timber in log form, but in just two years (from 2008-2010), imports of lumber into China more than doubled, and we expect this to continue at a rapid pace through 2015. This is good news for Canadian suppliers as they currently own a 50-percent share of lumber imports going into China, but with this increase in demand, we expect to see other markets looking to capture a bigger share of this business from them."

It was Chinese demand, in fact, that brought Canada's western timber region out of its recessionary slump. For the first time since early 2000, all nine of western Canada's major producers posted profits in the third quarter of 2010, almost entirely thanks to exports to China. The gains were realized despite falling prices for lumber and oriented strand board panels.

There is reason to believe that this demand will continue its climb. Evidence is seen in commodity ETF (exchange-traded funds) reports. The two funds representing the timber industry are among the leaders through the first four months of the year, becoming two of the three best performing ETFs in the Commodity Producers ETFdb Category so far in 2011. This, in the face of the continued slump in the American housing market. According to ETF Database, global wood consumption is up 20 percent in the first quarter of 2011 when compared to the year ago period, attributing demand from mainly two countries: China and another other recent factor, Japan.

Wood products are one of the Japan's most-needed raw materials in the aftermath of the destruction that resulted from the March 2011 earthquake and subsequent tsunamis that hit Japan.

"The devastation in Japan is terrible," Cimorelli added. "However, as they rebuild, they need additional raw materials."

Japan's massive rebuilding efforts will take some time before they affect the American supply chain, but the long-term outlook for Japan's rebuilding efforts is helping keep timber prices elevated. In the few months following the disaster, politics

and inefficient bureaucracy in Tokyo reportedly have made recovery painfully slow. Across the northeastern coast of Japan, where the damage is most acute, nearly 100,000 people are still sleeping on the floor in gymnasiums, schools and community centers. Only half of the 52,000 temporary homes that the government requested have been built. It took until June 20th before a basic law on reconstruction was enacted. But homes and businesses will be built, and demand for wood products will rise. It's just a matter of time before the Japanese government passes laws that will free bond issues and other means of financial aid. Those companies poised and ready to respond will benefit the most, meeting the spike in demand with good-quality American goods.

Another future-looking factor that impacts the Asian market – prevent prices from plummeting – is a new Russian timber tax, reportedly planned for implementation soon. (See sidebar: "State of Russia's Log Export Tariff.") This tax forces China to look for alternative supplies. And who better to meet the need than American hardwood producers.

"For the foreseeable future, the Asian market is sure to be an important market for American hardwoods," Cimorelli noted. "It will continue to be a key market just as it has been for the last several years."

State of Russia's Log Export Tariff

A factor playing a large part in an increase of Asian demand for American hardwood is the tariff placed on exported logs and lumber products from Russia. In February 2007, the Russian government announced that it would aggressively increase its tax on unprocessed log exports. A year later – in April 2008 – the tariff was instituted. Softwoods have been the most noticeable shift to date – in August 2010 China's imports of softwood logs from non-Russian sources exceeded imports from Russia. In addition, softwood lumber imports from non-Russian sources have increased dramatically, from 2.8 million cubic meters in 2007 to an estimated 8.7 million cubic meters in 2010.

The tariff amounted to 25 percent of value of unprocessed log exports. The tax was scheduled to jump to 80 percent of value of January 2009, but a one-year delay was announced due to the global financial straits. Then, as 2009 drew to a close, Russia announced another one-year delay in the tax increase, this time because of tough politics. The European Union

(EU) has threatened to block World Trade Organization (WTO) membership unless Russia retreats from its log export duty. In December 2010, Russian President Medvedev signed an agreement with the EU that relieved the pressure. However, according to an editorial by Bob Flynn, director of International Timber for RISI, there is still some confusion regarding what the tax will be. A number of news accounts point to a 50-percent reduction in the tax on softwood logs (to 12.5 percent) and a 75-percent reduction in the hardwood log tax (to an average of 6.25 percent), while others report the lower duty on softwood logs will be 15 percent.

After Russia signed the agreement in December 2010, Russian Prime Minister Putin declared that Russia's log tax will remain "unchanged at 25 percent" in 2011. Once Russia becomes a full member of the WTO, however, the tax structure will change. Change to what, by how much, and for how long, for each product line remains unknown, and Russia has given no firm details on the future level of the log export duty.

As these and other questions linger on this contentious issue, China and other Asian countries will likely continue looking to other countries for its softwood and hardwood needs. What's more, that demand will likely continue expanding. By Tracy Powell, Source: *Hardwood Matters*, August 2011.

INTERNATIONAL TRADE EXPERT SHARES VIEWS ON THE FUTURE OF U.S. HARDWOODS

Over the last several years, the U.S. hardwood market has looked increasingly to export markets to pick up the slack left by declines in domestic consumption. What happens in the higher grade markets certainly impacts low grade markets, such as pallets, packaging and crossties. Gains abroad may help to keep some mills afloat that otherwise would have died, which is good news for U.S. low grade hardwood markets.

International lumber expert, Michael Snow, executive director of American Hardwood Export Council (AHEC) recently talked with *Pallet Enterprise* about the growing global market for American hardwoods and the future of the industry. His comments are sure to interest any pallet or lumber company looking to take advantage of international markets.

PALLET ENTERPRISE: Where do you see the international hardwood market for American hardwoods going in the next five to 10 years? Are there some bright spots in demand and are there some places where we're having a hard time competing internationally?

Snow: I see mostly bright spots internationally. Particularly these last 2-3 years that have been so difficult in the domestic market, but if it wasn't for some of the real growth we've seen in a lot of the markets overseas we'd be looking at a much smaller industry than we have right now. We're seeing tremendous growth in places like China where we saw 2010 about 60% higher than 2009 and now we're seeing 2011 about 60% higher than 2010.

What's been the most exciting part is that most of that wood is now staying in China and being consumed there. I think probably a dozen years ago or so probably 90% of what we shipped into China was just made into furniture and came right back out. Now we're seeing real consumption and real consumption growth there which is very encouraging because that's actual new consumption of the wood not just a changing in the geographical location of manufacturing. We're also seeing places like Vietnam with tremendous growth over the last few years. Even Europe is coming back in a fairly strong way (Italy, the UK and Germany in particular). Probably a little less promising is southern Europe.

Everybody knows what's going on in Greece, Spain and Portugal, we've seen quite a drop-off there and that's probably not going to change anytime soon. In places like the Middle East we're seeing tremendous growth in demand. So I see many more bright spots than worry spots as far as international markets are concerned.

PALLET ENTERPRISE: Are there any other areas which are somewhat troublesome or are they the ones that you named that were primarily just economic driven?

Snow: I think it's economic driven where we are seeing declines in demand. In Spain the housing market there has absolutely collapsed. Four or five years ago Spain was third only to Canada and China.

Now it's just absolutely fallen off the map. As housing construction and renovation and door manufacturing (which is huge in Spain) has quite

simply plummeted. The thing that's also kept us in a very good position competing internationally has been the weakness of the dollar over the last couple of years, particularly relative to the Euro. So we've been in a pretty good position as currency rates go. And that's probably likely to continue for at least a while.

PALLET ENTERPRISE: Where do you see the certification and sustainability issue going and how does that play into U.S. strengths? What does the U.S. hardwood industry need to do to make sure that it's promoting not only what it does, but producing certified wood?

Snow: That's certainly a major issue that we're facing and we spent an awful lot of time and energy over the last few years getting the message out that certification is a useful tool and a particularly useful tool for somebody who's specifying or procuring wood from a high risk area. We've been very vocal saying that in the U.S. certification is not really a necessary component because we have very strong rule of law. We have very clear land tenure in the United States. We have a lot of things working in our favor and a long history of sustainability and a doubling of our standing hardwood timber over the last 50 years, with almost none of it being certified until very recently.

That being said there are a lot of markets overseas, especially a lot of architects that want to be able to check a box indicating that a large volume of wood they use is properly certified. This is indeed still a problem for the majority of hardwood exporters. It's not a lack of willingness from sawmills. In fact we see a majority of our members are actually chain of custody certified. The difficult part is getting access to the certified timber. Until the FSC's of the world find a way to really being in the small non-industrial landowner, and show him that it's in his interest to certify, I don't think we're going to see large volumes of certified wood coming out of the United States in the near future.

That does create some marketing challenges for us. But it's a question of reassuring people that with or without a label or paying somebody to tell you that it's sustainable, we have the data to show that the resource in the United States is in fact expanding and is very sustainable. We've been doing everything we can to make sure we get that message out, and we get that data out into as many hands as possible.

PALLET ENTERPRISE: Are there any certification systems that might be a little more appropriate for smaller guys? I think the American Tree Farm System has one, and the SFI that's run by the American Forest and Paper Association may appeal more to some timber interests...Right?

Snow: I think the systems you mentioned are probably at least in the text of the U.S. equally valid to FSC. But the problem for those systems is international recognition. When it comes to talking with international architects, designers or furniture manufacturers they all know FSC. They don't really know SFI and Tree Farm even with their mutual recognition with the PEFC system out of Europe, I think it still lags quite a bit behind in market recognition from FSC.

Besides sustainability concerns, one of the bigger issues that we're facing overseas is the question of legality, which is sort of a different hoop to jump through. The Lacey Act in the United States created for some overseas customers that are re-exporting things back into this country the need to show due diligence. Also, we're seeing the European Union this year put into place its own illegal timber law, sort of its own version of the Lacey Act. Japan has its version, and Australia has one coming. Suddenly, there's responsibility placed on the hands of importers with various countries to show that the wood was legally harvested.

A couple of years ago, we sponsored a major study from a group called Seneca Creek to address the legality concern. Seneca Creek previously had conducted a study on the problem of legal logging around the globe for the American Forest and Paper Association that was adopted by the United Nations a few years ago. We had them look at the hardwood forests in the United States and sort of conduct a risk analysis. That report is on our own website at www.americanhardwoodinfo.com.

What's been very interesting is now even FSC has been referencing that report when doing control wood audits in the United States. So, we've been able to point to this report as a way to give importers due diligence on a silver platter. It shows, of course, that there is some illegal harvesting that takes place just as theft happens in every industry in every country of the world, it's certainly not systemic and it's an extremely small percentage of any possible wood coming out the United States. I think the U.S. exporters have gotten a lot of mileage out

of that report. It's enabled them to get wood into places like the European Union and Japan without having to actually go through the process of certification.

PALLET ENTERPRISE: You mentioned the Lacey Act and other measures coming on line, are these starting to have an impact on the illegal timber around the globe?

Snow: I think it's probably made it a little bit more difficult to trade an illegal timber. But I am pretty skeptical that it's having any real impact on the ground because so much of the illegal logging takes place in areas where it is not being exported.

I saw a study a few years ago that the percentage of felled trees in the world that actually crosses a national border is something like one tenth of one percent. So trying to regulate trade in wood as a way to change what's happening on the ground I think is a fallacy.

I think it might make you feel better, but when we look at where deforestation is going on and where the major problems of illegal occur it's the Amazon being turned into grazing land for cattle, palm oil plantations going up in Southeast Asia, and now bamboo plantations actually replacing national forests in Southeast Asia.

PALLET ENTERPRISE: Oh, I thought bamboo was good for the environment! (HaHa!)

Snow: Bamboo gets the automatic free-pass because it grows quickly. People want simplicity and unfortunately the green building system LED here in the United States reflects that. It's not based on science. It's prescriptive, we're seeing too often single attributes basically defining products. People think, 'You know bamboo is rapidly renewable so it's automatically good. Steel and plastic are recyclable. So it's good,' But we need to look at the overall.

I don't know if you've seen anything that we're doing. We are undertaking the biggest lifecycle assessment for wood products done anywhere in the world. We have the data now for hardwood lumber from the forest to the sawmill from the sawmill to the port and from the port delivered from the United States to several ports overseas. We have all the preliminary data done, and it's just been submitted to a peer-review panel that's being chaired by the King's College in London. We want to have everything third-party, peer reviewed before we release it. So we're going to have the initial data on the lumber done and peer

reviewed we hope by early to mid September. We've already begun the data processing for sliced veneer and our next step is going to be a couple of representative products, such as solid hardwood flooring or window framing.

Our plan is to produce what we called Environmental Product Declarations (EPDs). There's a new ISO standard that's coming down the pike on what we called EPDs. We really think this is going to be fantastic news for wood producers in general. The way to look at EPDs is essentially to think of the food labels at the supermarket. Everything is laid out to show portion size, calories, etc. All companies use the same format and provide information to be analyzed. If you pick up two different candy bars, you can actually compare the two of them.

EPDs for building materials and consumer products will be very similar. They are going to take into account embodied energy, the extraction process, basically the entire life cycle inventory information on different products. EPDs are already being used for building products in Europe and will be required in that region by 2016. The U.S. market is actually a little bit behind the ball on this. We want to have ISO-prepared EPDs for American hardwoods and American hardwood products by late 2012. We really feel that this is going to put a lot of pressure on LED and the Steel Frame Institute and the others that are making some egregious environmental claims compared to wood. We're putting it out there, we're setting the bar. You come back and show us your embodied energy, the extraction, the water use, the pollution created in the manufacturing process – wood scores well when analyzed from this holistic perspective. We think it's fantastic news for both U.S. exporters and domestic producers of wood and wood products.

PALLET ENTERPRISE: What impact do you see the growth internationally of hardwood markets having on the domestic hardwood industry? What ripple effects could the international hardwood market have on the low-grade market in this country?

Snow: I think international demand is the key to maintaining and driving production back up to levels where it was ten years ago. Right now about 40% of the graded lumber is exported. Ten or fifteen years ago that number was close to 15%. We think that the percentage is going to be well over 50% within the next five years.

When you look at the international markets that's where you are seeing growth in the number of potential wood consumers. In places like China there are literally hundreds of millions of people coming out of poverty into middle class lifestyles. Places like India or Brazil, I think a lot of the increased consumption is going to be happening overseas.

American hardwoods are very well placed to meet that need. I thought it was very interesting to see this year's U.N. Timber Committee Market Report. Their main finding on the United States is that we may actually be under utilizing our forest resources.

PALLET ENTERPRISE: What is one major misconception about the global marketplace for wood and wood products? **Snow:** I think we tend to look too often at globalization just from the manufacturing end where globalization is a huge threat to U.S. manufacturing. We forget that there's a lot of global consumption now where foreign markets show promise for increased demand for U.S. products. I think the companies that look at that from an opportunity perspective rather than as defensive threat perspective are to be a much better position to take advantage of these trends.

And the other big message that we must get out is that we've finally turned a corner on the whole environmental issue. I think the more that the spotlight is shined on environmental issues, the better it will be for U.S. hardwoods. It should have always been better news for us but somehow we ended up playing defense. I think we're finally in a position where we're ready to go on the offense. And that's going to be a major driver for demand both domestically and internationally in the years to come. By Chaille Brindley, Source: *Pallet Enterprise*, August 2011

WOODY BIOMASS – WHAT IS IT?

Whenever "woody biomass" is mentioned, it seems to be used interchangeably with wood energy, which can get confusing; woody biomass is technically any woody portion of the tree including the roots. Within the forest industry, however, we tend to limit this definition to the woody portions of a tree that grow above ground that do not meet specifications for a higher value product (pulpwood, sawlogs, etc.). When this definition is used, some of the products being produced (residential wood pellets) or planning to be produced (i.e. ethanol) are/will be utilizing pulpwood-sized material to produce their products.

However, it is fairly common to hear that these facilities are/will be utilizing woody biomass, when, in reality, the material they are using in many cases meets pulpwood specifications, with the exception being that sound dead woody material can be used for many wood energy products, but typically is not used for pulpwood.

If we are truly in a capitalist market, what does it matter what product the wood is going into, whether it goes to produce paper, wood composite panels, or energy? When the problem arises is when the same material (i.e. pulpwood) is subsidized for one use but not the others. It is at that point the competitive fair-market value is no longer a factor.

There are many opinions on whether woody biomass should be subsidized. On one side is the opinion that we need to produce more fuel domestically and subsidies are needed to help establish the renewable fuel industry. On the other side is if it is a valid concept, it should be able to compete in the marketplace without subsidies through marketing, finding niches, or just having more value than the other products.

The bottom line is the markets/demand for woody biomass will continue to evolve as well as the details on how this will happen.

By Don Peterson

Source: *Great Lakes Timber Professionals Association*, July 2011

COMPLAINTS DON'T MEAN PROBLEMS, RATHER COMMUNICATION ISSUES

The Master Logger Certification program seems to be getting more calls on the complaint line this past year. Though some would look at this as a problem, I see it as the Master Logger Certification program and its complaint system becoming more known and understood. Some of the calls are legitimate complaints about in-the-woods or business practices, while others are not legitimate complaints or individuals simply seeking general information.

Most complaints tend to lead back to communication issues between the landowner (public or private) and the logger or between the forester (public or private) and the logger. In some cases, miscommunication between the consulting forester and the landowners puts the logger in the middle. The first step is a detailed contract and harvesting plan (can be one in the same) that outlines what will be done and who is responsible for getting it

accomplished. I am not advocating a lengthy, drawn-out contract, but one that addresses only pertinent/expected standards of performance (utilization, road/skid trail placement/specifications/condition, stream crossings, etc.).

Another common communication issue that seems to arise is contract amendments. The forester or landowner will tell the logger once the sale has started to do something different from the initial contract. For the protection of everyone involved, it is recommended that any and all of these changes to be contract be documented in writing and signed by both the landowner and the logger. Clear and simple amendments that are agreed upon and signed can greatly reduce the chances of confusion and misinterpretation. This could be especially critical with logger contracts where the forester administering the sale may change a portion of the sale and/or their expectations in part of a sale; without documentation, there may appear to be a contract violation. A sample contract amendment and other sample pertinent timber sale items can be downloaded from the Wisconsin Master Logger Certification website (www.wimlc.com) at the bottom of the "Program Overview" page. If you carry a sample amendment in the field with you, many simple contract amendments can be taken care of on site immediately.

Another part of effective timber sale communication is discussing expectations regarding rutting, soil disturbance, residual stand damage, slash heights, etc. Though some or all of these items may be specifically addressed within the contract, some may be purposefully vague. For instance, some contracts will define exactly what a rut is while others will simply say "no excessive rutting." If the contract says "no excessive rutting," getting an understanding on what the contract holder defines as "excessive" can be critical depending on soil types and weather conditions. Also, does the "no excessive rutting" mean "no rutting" or is some rutting on primary skid trails and haul roads acceptable as long as they are fixed before the sale is closed out?

Communication seems like it should be the most simple aspect of a timber sale, but it often times can be the source of most timber sale complications.

By Don Peterson

Source: *Great Lakes Timber Professionals Association*, July 2011

MASONITE TO ACQUIRE MARSHFIELD DOOR SYSTEMS

Tampa, Florida – Masonite has signed an agreement to acquire Marshfield DoorSystems Inc. The transaction is expected to close immediately following regulatory approval. 2010 revenues for Marshfield exceeded \$100 million.

Marshfield Door manufactures doors and components for the architectural and commercial markets. The company is headquartered in Marshfield, Wisconsin with two additional locations in Greensboro, North Carolina and Largo, Florida. Marshfield Door employs 600; steadily improving orders for doors allowed it to recall some 80 employees in February.

“The combination of Marshfield and Masonite’s Mohawk branded commercial door business provides our customers with a wider range of innovative door products for the more demanding commercial and architectural applications.” Fred Lynch, Masonite’s president and CEO stated in a release. “Marshfield also provides an important additional platform of strategic growth for our company.”

Masonite has been expanding. In October 2010, it acquired assets of Lifetime Doors, a Farmington Hills, Michigan manufacturer of flush door systems. In May Masonite consolidated Lifetime Doors operations, auctioning machinery from its Easton, Pennsylvania plant.

Marshfield CEO Don Bergman will continue with Masonite, overseeing and expanding Masonite’s architectural and commercial door business.

“Both Marshfield and Masonite have solid reputations for delivering great customer service and quality products.” Bergman said in a statement. We look forward to partnering with Masonite to provide new opportunities for our customers, employees and suppliers.

Marshfield Door can trace its roots back to 1890, as the Hatteberg Veneer cutting operation. The company was sold to W. H. Roddis in 1897, and production of the first solid core took place in 1908, under the Roddis Company name. Weyerhaeuser purchased the Roddis Plywood Corporation door and veneer fabrication facility in 1960 and steadily expanded the plant’s capabilities over the next 40 years. In 2000, the Weyerhaeuser Door Division was purchased by the newly formed Marshfield DoorSystems Incorporated with the backing of Wind Point Partners, a private equity investment firm.

By Karen Koenig, July 2011, Source: <http://woodworkingnetwork.com>

PAPER: THE POSSIBILITIES ARE ENDLESS

I have to admit that there are times when the messages from companies and green groups, who insist the world would be a better place if we would all stop using paper, can get me down, especially considering my line of work.

My problem – and it’s probably the same for a lot of people – is that I have a tendency to think about paper in the more traditional sense, such as newspapers, magazines, books, copy paper, that sort of stuff. But if you look around enough (on the Internet of course), there’s a lot of eye-opening innovations being created using paper as a base product.

The bad news is, however, the paper producers aren’t the one working on the eye-opening innovations.

The good news is; there are research companies with creative minds at work and individual scientists who think outside the traditional paperboard box and some of these new paper-based applications might actually catch the eye of the producers.

Dr. Frank Miletzky, President of the German research and testing company, PTS, in its annual report prefaces with, “Paper is and will remain a fascinating material. We are determined to further exploit its potential and open up new applications.” He also notes that although traditional applications for some grades of paper will decrease, “.....in the medium and long term, demand for new, innovative applications of paper can be expected to grow strongly.”

For example, Dr. Miletzky points to opportunities in areas outside the traditional paper markets. “Combinations of natural fibers with other components lead to fiber composites offering entirely new properties. Examples of these innovative PTS products area highly filled papers with ceramic and metallic characteristics for light-weight construction elements or novel safety papers providing protection against product piracy.

Currently, PTS is developing ecologically and toxicologically harmless flame-retardant papers, which could be produced on conventional paper machines.

Another new application is a multi-functional paper-sheet metal composite. According to PTS, it can be used as thin-walled, high-strength body sheet for vehicle construction. The material is

expected to improve the car’s vibration characteristics and reduce noise, along with offering enormous potential for significant material savings and weight reductions, leading to a more fuel-efficient vehicle.

PTS adds that, “Cellulose fibers used as substitute for petro-chemically based synthetic fibers are more environment-friendly and expected to save significant amounts of production energy.”

Another innovator, Innventia, has developed, among other things, “interactive” paper and packaging materials that change color and shape in response to various stimuli, which can, for example, be used to create smart packaging solutions,

Other scientists have turned paper coated with ink made of silver and carbon nano-materials into a paper battery that holds promise for new types of lightweight high-performance energy storage. Researchers say that the paper battery has the potential to be a low-cost, flexible electrode for any electrical device, but its biggest impact may be in large-scale storage of electricity on the distribution grid or could also be used in powering electric or hybrid vehicles.

The industry needs to continue its efforts to improve and produce paper for traditional uses – currently its bread and butter. But it’s imperative for producers to look beyond their comfort zone because paper’s possibilities are endless.
By John O’Brien, Managing Editor
Source: *PaperAge*, July/August 2011

FOREST SERVICE REPORT DOCUMENTS ENVIRONMENTAL BENEFITS OF WOOD AS A GREEN BUILDING MATERIAL

**Agriculture Secretary Vilsack urges
US builders to prioritize wood in green
buildings**

Washington, September 29, 2011 – The findings of a new U.S. Forest Service study indicate that wood should factor as a primary building material in green building. Agriculture Secretary Tom Vilsack announced on September 29th.

The authors of *Science Supporting the Economic and Environmental Benefits of Using Wood and Wood Products in Green Building Construction* reviewed the scientific literature and found that using wood in building products yields fewer greenhouse gases than using other common materials.

“This study confirms what many environmental scientists have been saying

for years,” said Vilsack. “Wood should be a major component of American building and energy design. The use of wood provides substantial environmental benefits, provides incentives for private landowners to maintain forest land, and provides a critical source of jobs in rural America.”

The Forest Service report also points out that greater use of life cycle analysis in building codes and standards would improve the scientific underpinning of building codes and standards and thereby benefit the environment. A combination of scientific advancement in the areas of life cycle analysis and the development of new technologies for improved and extended wood utilization are needed to continue to advance wood as a green construction material. Sustainability of forest products can be verified using any credible third-party rating system, such as Sustainable Forestry Initiative, Forest Stewardship Council or American Tree Farm System certification.

“The argument that somehow non-wood construction materials are ultimately better for carbon emissions than wood products is not supported by our research,” said David Cleaves, the U.S. Forest Service Climate Change Advisor. “Trees removed in an environmentally responsible way allow forests to continue to sequester carbon through new forest growth. Wood products continue to benefit the environment by storing carbon long after the building has been constructed.”

The use of forest products in the United States currently supports more than one million direct jobs, particularly in rural areas, and contributes more than \$100 billion to the country’s gross domestic product.

“In the Rockies alone, we have hundreds of thousands of dead trees killed by bark beetles that could find their way into the building supply chain for all types of buildings,” said Forest Service Chief Tom Tidwell. “Taking a harder look at wood as a green building source could reduce the damages posed by future fires, maintain overall forest health and provide much-needed jobs in local communities.”

The U.S. Forest Service report identifies several areas where peer-reviewed science can contribute to sustainable building design and decisions. These recommendations address the following needs for use of wood as a green building material:

- Information on environmental impacts across the lifecycle of wood and

alternative construction materials need to be updated and revised;

- Green buildings codes and standards should include adequate provisions to recognize the benefit of a lifecycle environmental analysis to guide selection of building materials; and

- A lack of educational, technology transfer, and demonstration projects hinder the acceptance of wood as a green building material.

Research recently initiated by the wood products industry in partnership with the U.S. Forest Service Forest Products Laboratory will enable greater use and valuation of smaller diameter trees and insect and disease-killed trees. Research on new products and technologies has been initiated including improved cross-lamination techniques and the increased use of nanotechnology.

These developments are especially important amidst a changing climate because forest managers will need to increasingly thin densely forested areas in the coming years to reduce the impacts from longer and more severe wildfire seasons. Continued research of wood-based products and technologies will contribute to more environmentally responsible building materials and increased energy efficiency.

The mission of the U.S. Forest Service is to sustain the health, diversity, and productivity of the nation’s forests and grasslands to meet the needs of present and future generations. Recreational activities on our lands contribute \$14.5 billion annually to the U.S. economy. The agency manages 193 million acres of public land, provides assistance to state and private landowners, and maintains the largest forestry research organization in the world. Source: United States Department of Agriculture, Office of Communications, September 2011

<http://www.usda.gov/wps/portal/usda!/ut/p/c5/04>

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1988 19’6” Mack, 350 HP, 12 Speed, camelback suspension, pulp truck w/Prentice F90T loader 22’ w/1987 Rose pup, 16’3” spring ride all in good running condition, \$20,000.

Contact Lloyd J. Wiese, W3117 County Road A, Stetsonville, Wisconsin 54480;

Phone (715) 678-2319; Cell (715) 965-6331, FAX (608) 275-3338.

Slightly used Fas Trac Model #307 left hand band blade sharpener. For immediate shipment. Sharpens 2-2 1/2” to 7” – for blades 20 foot length and under. Contact Harry R. Schell, Inc.; 601 West Park Street, Blue River, Wisconsin 53518; Phone 1-800-462-5807; e-mail hirschell@mwt.net. Also visit our new website at www.schellsaws.com.

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1) edger, high point tool, 13” width, 15 hp; 2) Pedestal cutoff saw; 3) Ebac drying kiln, 10,000 bf capacity; 4) Ebac drying kiln, 3,000 bf capacity; 5) 2-bag portable dust-collector, Delmar machinery; 6) portable blower, 10 hp. All machines operate on 3 phase, 480 volts; 7) oven, lab, Quincy Lab Company, convection cabinet, 16” x 18” x 12” chamber; 8) welder; 9) numerous miscellaneous tools. Contact Arne Larson, Blooming Valley Lumber, N6340 Blooming Vale Road, Trego, Wisconsin 54888; Phone (763) 286-2629; e-mail atfirstclass@yahoo.com.

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Announcing our new narrow bandsaw blade sharpening service; besides our experienced circular wide band and carbide sawblade repair. Contact Harry R. Schell, Inc.; 601 West Park Street, Blue River, Wisconsin 53518; Phone 1-800-462-5807; e-mail hirschell@mwt.net. Also visit our new website at www.schellsaws.com.

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ADDRESS-----COUNTY -----

CITY ----- ZIP CODE -----PHONE AC (----) -----

WISCONSIN LOCAL-USE DIMENSION LUMBER GRADING

A procedure is in place under which Wisconsin sawmills are able to produce dimension lumber that may be sold without a grade-stamp issued under the authority of a lumber grading bureau, and that lumber may be used in residential construction when directly sold to the person who will inhabit the dwelling (or to a person acting on his or her behalf) and for whom a building permit has been issued. To do this someone from the mill must attend one of the **Wisconsin Local-Use Dimension Lumber Grading Short-Courses** that are offered for Wisconsin sawmill operators. These one day special short-course training sessions are offered several times a year, at no charge, and are advertised in the WI-DNR's Wisconsin Woods Marketing Bulletin. **Successful completion of this course and successfully passing an associated test is required for anyone that wishes to produce and sell local-use dimension lumber in Wisconsin that will be used in residential construction. This means someone in your company needs to attend the course if you wish to produce Wisconsin Local-Use Dimension Lumber. (Note: Local-use dimension lumber is lumber that is not grade-stamped under the authority of a grading association.)**

If you wish to produce and directly sell Wisconsin Local-Use Dimension Lumber that may be used in residential construction, you will need to get someone from your mill to a course so they be certified (as a representative of your mill). Also if you do custom sawing for anyone who wishes to use the lumber in their dwelling (such as if you have a portable mill and are custom sawing logs for forest landowners who want to use that lumber in building their home), this would apply to you and you also should get the training and get certified.

The next one-day Wisconsin Local-Use Dimension Lumber Grading Short-Course that you can register for will be offered on April 3, 2012 at the University of Wisconsin-Stevens Point Wood Lab in Stevens Point WI. The short-course is one day in length, beginning at 9:00 AM and ending at around 4:30 PM (at the latest).

There will be no fee for attending - HOWEVER - pre-registration is required – there will be NO WALK-IN REGISTRATION - (space is limited to 20 persons maximum for each course to allow for more interactive discussion). Pre-registration for the course must be received before for March 15, 2012 for the April class to permit time to confirm registrations, and for mailing all students a grading manual for advance study, and travel directions and other materials.

To register for any of the short-course, you may email, FAX or phone in your registration. Your registration will be confirmed (also by email, FAX, mail or phone) OR you will be informed the course is full.

TO REGISTER:

Email the following information to: RGOVETT@UWSP.EDU (email registration is preferred if possible)

Provide the following information when registering:

- 1) The full name (or names) of the person (or persons) being registered**
- 2) The company name (if different from the person's name)**
- 3) A complete mailing address (including zip code)**
- 4) Phone number (with area code)**

OR if you do not use email you can FAX to: Bob Govett 715-346-4821

OR you can simply phone Bob Govett (715-346-4212) – if you phone in your registration – please be sure to spell out the name and address



Department of Natural Resources
Forest Products Specialist
3911 Fish Hatchery Road, Route 4
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The Wisconsin Department of Natural Resources reserves the right to edit all items included and accepts no responsibility for the accuracy of description or for the commercial integrity of the persons or firms making offers in this Bulletin.

If you wish to use the facilities of the Bulletin, forward a letter, post card or form on page 11 with detailed description of your "wanted" or "for sale" items. All forest products (stumpage, logs, pulpwood, posts, poles, trees and lumber, etc.) and services (custom sawing, custom kiln drying and tree planting, etc.) may be listed. Please be sure your full name, address (including zip code), telephone number accompany your listing, there is no cost for listing any items. If you want items repeated in the next issue, send in a written request. If you have comments about the Bulletin or have suggestions on its content, write to: Forest Products Specialist, 3911 Fish Hatchery Road, Fitchburg, WI 53711, phone (608) 231-9333 FAX (608) 275-3338.

DEADLINE FOR ITEMS TO BE LISTED IS THE 20TH OF: MARCH, JUNE, SEPTEMBER and DECEMBER.



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